



Is your Contract Lifecycle Management solution holding you back?

Take flight with **UpsideContract's** **Salesforce** modules!

Native integration with Salesforce starting from \$49.99/month!



The worldwide leader in Contract Lifecycle Management (CLM) solutions with hundreds of deployments in 180 countries.

UpsideContract is an enterprise-class contract management solution providing full contract lifecycle management functionality – including collaborative contract creation and negotiation, performance, compliance and risk management, amendment and renewal processing, commitment management and event management – in a package that is completely web-based with no plug-ins required. The advanced design and extensive flexibility of the user-configurable interface enables rapid user adoption while robust security ensures information and functions are granted only to the appropriate people.

UpsideContract offers two integration options with Salesforce® that enable users to create contracts directly from the Salesforce interface.

If you don't already have UpsideContract and want leading edge and comprehensive contract management functionality, choose **UpsideLive for Salesforce**, our Native Force.com module, and capitalize on full contract lifecycle management functionality directly from the Force.com platform with no installation or integration required. UpsideLive for Salesforce is available to try for FREE.

Or, if you already have the award winning UpsideContract, choose the **Salesforce Connector** that enables users to create contracts right through the Salesforce interface, finalize the contract and then bring it back into Salesforce.

Each solution is easy to use, cost effective and provides seamless interaction between Salesforce and UpsideContract.

UpsideLive for Salesforce

- ✓ No installation or integration required
- ✓ Full contract lifecycle management functionality
- ✓ Runs exclusively on the Force.com platform

Try it for FREE

OR

Salesforce Connector

- ✓ Create contracts directly from Salesforce
- ✓ Finalize contracts in UpsideContract
- ✓ Integrate back into Salesforce



UpsideLive for Salesforce

Here are just a few of the features and highlights of UpsideLive for Salesforce:

- Manage users and user profiles with permissions to control what areas of the contracting lifecycle each user is involved in.
- Utilize contract wizard functionality to simplify the collection of contract information and streamline the contract generation process.
- Configure your contracts to suit your needs - maximum configuration options allow the creation of user defined fields and contract header data.
- Searchable contracts provide the ability to quickly locate information within contract fields.
- User defined workflow and approvals ensure all contracts go through the necessary checkpoints and are routed to the appropriate parties accordingly. Users are able to approve or reject tasks.
- Notifications for key tasks throughout the contract lifecycle ensure all stakeholders are kept up to date and the contract lifecycle is kept moving efficiently.
- A comprehensive audit trail is maintained to ensure all actions can be traced back and reviewed.
- Robust reporting features allow users to choose from pre-configured reports or create ad hoc Salesforce reports.
- Dashboards provide a starting point for each user based on the pieces of information that they find most useful. Items such as graphical charts which include key contract data, calendars to highlight upcoming action items, and a “my tasks” section.
- Microsoft® Word plug-in components enable seamless integration with Microsoft® Word while providing authentication features to validate user permissions and access.
- Templates can be created in Microsoft® Word and used within the application to regulate contract creation and maintain standard terms and conditions.
- Contracts can also be created in Microsoft® Word (with the option to use standardized templates), then sent from UpsideLive for Salesforce to stakeholders and provide tracking information during the review and negotiation process.
- All data resides within Salesforce and provides the ability to login/logout as well as work offline.
- Standard Force.com features are available to extend configurability and integrate with your existing Salesforce usage.

UpsideLive for Salesforce Highlights

- Manage users and user profiles with permissions to control access.
- Contract wizard functionality streamlines the contract generation process.
- Configure contracts to suit your needs.
- Searchable contracts allow you to quickly locate the information you are looking for.
- User defined workflows and approvals ensure all contracts go through the necessary checkpoints and are routed accordingly.
- Notifications for key tasks ensure all stakeholders are kept up to date.
- A comprehensive audit trail ensures all actions can be traced and reviewed.
- Robust reporting features provide useful information at your fingertips.
- Dashboards for each user put the information they use most within easy reach.
- Microsoft® Word plug-in components enable seamless integration.
- Templates can be created in Microsoft® Word and used to regulate contract creation.
- Contracts can also be created in Microsoft® Word and then sent to stakeholders with tracking information during the review and negotiation process.
- All data resides within Salesforce.

Salesforce Connector

The Salesforce Connector is a pre-configured tool that allows a sales Opportunity in Salesforce to trigger the creation of a contract within UpsideContract. Salesforce can be modified to include fields and buttons that initiate the contract generation and store a link to the contract (or a PDF copy).

Once the contract has been requested by Salesforce, UpsideContract will generate the contract from a pre-defined template and insert key meta-data from the Opportunity (i.e. Customer Names, Dates, and Line Items) into the contract as required. The system will then trigger a workflow step that would either route the contract through an internal approval process or send the contract back to Salesforce as a completed contract.

Here are just a few of the features and highlights of the Salesforce Connector:

- Allows a sales Opportunity in Salesforce to be used to trigger contract generation within UpsideContract.
- Salesforce can be modified to include fields and buttons to trigger the generation of a contract.
- Once triggered, UpsideContract will generate the contract.
- Stores a link to the contract or a PDF copy of the contract in Salesforce.
- Contracts in UpsideContract can be generated from a pre-defined template and key data from the Opportunity (i.e. Customer Name, Dates, and Line Items) can be inserted into the contract as required.
- UpsideContract will trigger a workflow step that would either route the contract through an internal approval process or send the contract back to Salesforce as a completed contract.

For more detailed information on UpsideContract's Salesforce modules, please visit: <http://www.upsidelive.com/forsalesforce>

About Upside Software

Upside Software is the worldwide leader in Contract Lifecycle Management (CLM) solutions. Customers around the globe use Upside Software's suite of products to confidently perform Contract Management, Commitment Management, Sourcing & Procurement, and Invoice & Billing management activities throughout their organizations.

Upside Software's products address the needs of Enterprise (e.g. Fortune 500, Global 2000), Public sector (Federal, State / Provincial, Municipal and Health Care), and Small & Medium Enterprise (SME) customers. Customers realize significant cost savings while improving customer and supplier relationships. Upside Software's solutions are deployed very quickly and typically provide a full return-on-investment (ROI) in well under a year.

Founded in 2000, Upside Software is a profitable (since 2001), rapidly growing software company with an advanced, yet mature, and comprehensive product suite. The company has extensive experience delivering real value to customers (about 300) of every size and in most industry verticals.

For More Information:

Upside Software Inc.

Suite 310, Manulife Place
10180 – 101 Street
Edmonton, Alberta, Canada T5J 3S4

Phone: 1-877-984-2455- toll free
+1 780-702-1432 (local)

Fax: +1 780-702-1438

E-mail: ask@upsidesoft.com

Visit: www.upsidesoft.com